HOW TO CREATE PERSONAL REQUISITION SEARCHES

These instructions will allow you to create specific types of searches for requisitions and save those searches for future use.

A user can create multiple searches.

Navigation: *Purchasing/Requisitions /Maintain Requisitions*
Click ‘Find an Existing Value’.

Business Unit	Required
Requisition ID	Optional - select your criteria from the drop down
Requisition Status	Optional – select your criteria from the drop down
Origin	Optional - select your criteria from the drop down
Requester	Optional - select your criteria from the drop down

Once you select your criteria for the search,

1. Click on the link ‘Save Search Criteria’.
2. A new page will appear named ‘Save Search As’.
3. Give your search a name.
4. Click ‘Save’.
5. Another page will appear.
6. Click on the link ‘Return to Advanced Search’.

Now at the top of the page named ‘Find an Existing Value’ you will have a drop down name ‘Use Saved Search’.

1. Click on the drop down to view your selection.
2. Select your saved search and all the reqs will appear that meet your criteria.

HOW TO CREATE PERSONAL
PURCHASE ORDER SEARCHES

These instructions will allow you to create specific types of searches for purchase orders. This search allows the user to search in a number of ways for a particular purchase order or orders and to save that search for future use.
A user can create multiple searches.

Navigation: *Purchasing/Purchase Orders /Maintain Purchase Orders*
Click 'Find an Existing Value'.

Business Unit	Required
Purchase Order	Optional - select your criteria from the drop down
Purchase Order Date	Optional - select your criteria from the drop down
PO Status	Optional - select your criteria from the drop down
Short Vendor Name	Optional - select your criteria from the drop down
Vendor ID	Optional - select your criteria from the drop down
Name 1	Optional - select your criteria from the drop down
Buyer	Optional - select your criteria from the drop down
PO Type	Don't use this field – there is only one type of po.
Purchase Order Reference	Optional - select your criteria from the drop down

You can set a number of these searches up and save them depending on the criteria you use on this search page.

Once you select your criteria for the search,

1. Click on the link 'Save Search Criteria'.
2. A new page will appear named 'Save Search As'.

3. Give your search a name.
4. Click ‘Save’.
5. Another page will appear.
6. Click on the link ‘Return to Advanced Search’.

Now at the top of the page named ‘Find an Existing Value’ you will have a drop down name ‘Use Saved Search’.

1. Click on the drop down to view your selection.
2. Select your saved search and all the pos will appear that meet your criteria.

Create a Purchase Order Template

Navigation: **Purchasing > Purchase Orders > Maintain Purchase Orders**

1. **‘Add a New Value’** – Enter/Verify Business Unit (BU).
2. Where ‘Next’ should be enter ‘TMPLT-(short name of the vendor or buyer).
3. Next. Click ‘Add’.
4. Select vendor number 9999999999, named ‘FIND A VENDOR’.
5. Select a buyer.
6. Click the Defaults hyperlink. Enter all default information such as Ship To, Due Date, Category, UOM, and Distributions. Click OK.
7. Click Header Details hyperlink to enter information into the PO Ref. This will display when you inquire or do a search.
8. Verify the billing address.
9. Select the correct Origin.
10. Verify that the Tax Exempt ID is correct and selected.
11. Verify that the Hold From Further Processing option <u>is</u> selected. This creates the template.
12. Verify that the Dispatch option is selected.
13. Select method = Print.
14. Accounting Template = Standard
15. Acctg Date = Current Date.
16. Click OK.
17. Enter a Description of XXXXXXX.
18. Enter a Quantity of ‘1’.
19. Enter a UOM of ‘EA”.
20. Enter a Category of 00505.
21. Click the Schedule Tab. Check the Ship to, UOM, Distribution, etc.
22. Click Save

Create a Requisition Template Checklist

Navigation: Purchasing > Requisitions > Maintain Requisitions

1. 'Add a New Value' Tab – Enter/Verify Business Unit (BU).

2. Requisition ID – Where 'Next' should be enter 'TMPLT-(short name of the vendor or user).

3. Click 'Add'.

4. Verify/Enter the Origin field.

5. Enter 'Requester' (this usually defaults in).

6. Click the 'Hold from further Processing' box.

7. Click the "Header Defaults" hyperlink. Verify that the Override button is selected. Enter all information that will be the same for all items. A vendor could be selected here. Click OK. Enter your distribution here for the entire requisition.

8. Enter a description of 'XXXXXXX'.

9. Enter the Quantity of 1.

10. Enter a unit of measure of 'EA'.

11. Enter a category of '00505'

12. Click the Schedule Tab. Enter/Verify the Ship To, Due Date, Req Qty, and Price.

13. Click the Distribution hyperlink. Enter/Verify that the Location, Req Qty, GL Unit, Account, Operating Unit, Fund, DeptID, Class, have values entered. Click OK.

14. Click Save.

15. To copy this requisition into another requisition: (a) open a new requisition; (b) click on the 'Copy From' link at the bottom of the page; (c) select the appropriate requisition template.

TIPS AND WORK AROUNDS
FOR PURCHASE ORDERS

1. Address reverts to default address on the purchase order.
    a. Select the Buyer before selecting the address;
    b. Then return to ‘Detail’s’ and select the correct address;
    c. Do not ‘Refresh’ the page.

2. Enter Header Detail and Default information prior to entering items.

3. Adding additional descriptions on a purchase order.
    a. Complete the schedule page before adding the additional description,
    b. Return to the PO Forms page and insert the description.
    c. Do not ‘Refresh’ the page.

4. Canceling purchase orders after being dispatched.
    a. Check the box by the item to be cancelled.
    b. Go to the ‘Schedule’ page.
    c. Click on the ’X’ for cancel.
    d. Return to the PO Form page click on ‘Line Details’ and click on the ‘X” for cancel,
    e. When cancel is complete you will get a window to re-budget check, this takes the encumbrance out of the system.